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## ABSTRACT

This guide is one of the results of the New England Interstate Project 505 effort. The materials were useful in Vermont for State Department of Education personnel working with local education agencies and may also be useful in other places. The guide contains materials explaining (a) department planning procedures, (b) department planning process, (c) developing an educational philosophy in local school districts, (d) developing educational goals in local school districts, (e) determination of needs, (f) a plan of action, (g) a plan of action worksheet, (h) developing measurable objectives from educational processes for students, and (i) samples of some plan of action charts. (RC)

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This document is one of the practical results of the New England Interstate Project 505 effort over the last few years. These materials have proven extremely useful in Vermont for SDE personnel working with LEA's. We believe they may also be useful in other places.

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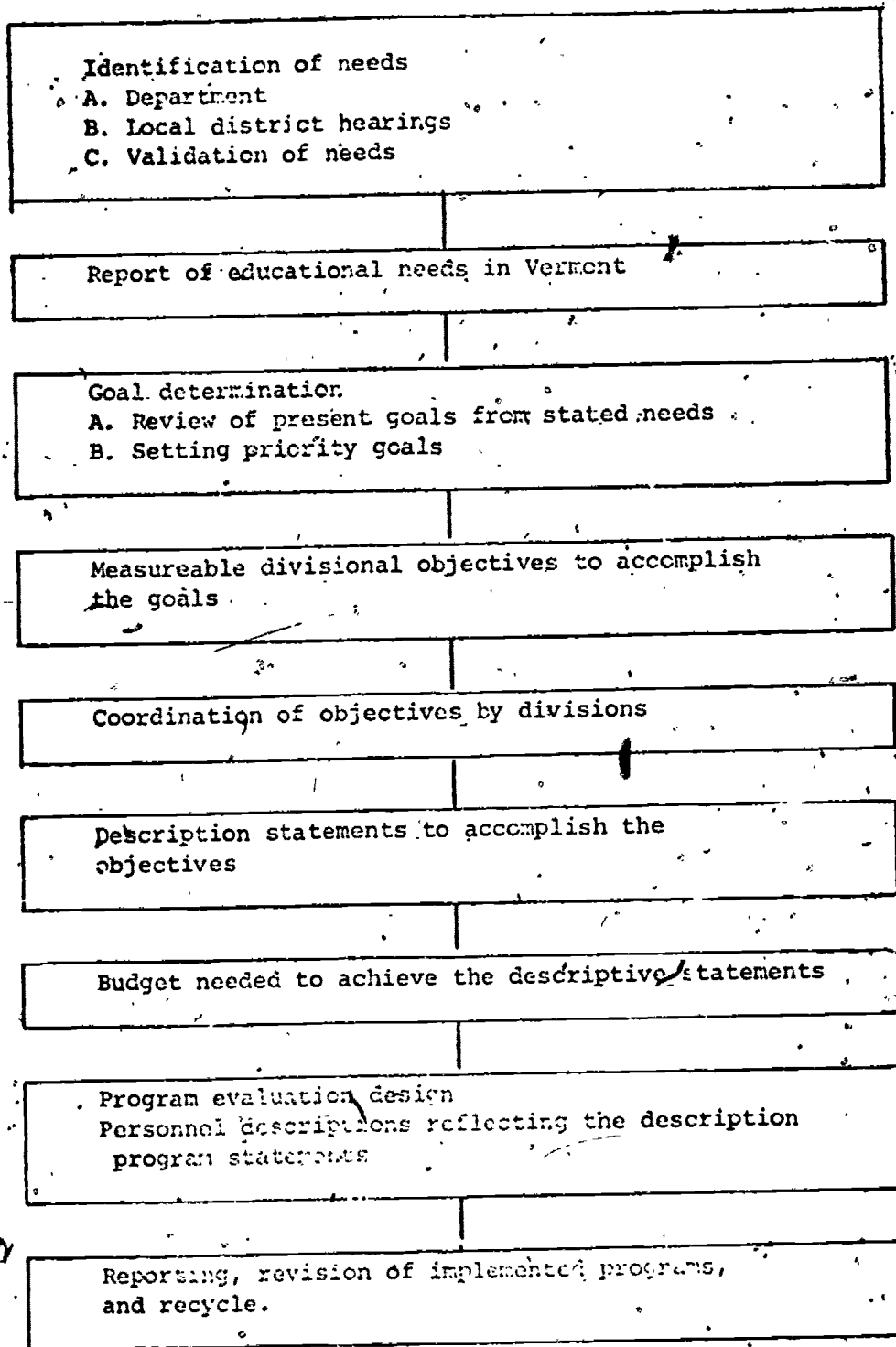
VERMONT

STATE EDUCATION DEPARTMENT

PLANNING PROCEDURES

FEBRUARY - 1974

## DEPARTMENT PLANNING PROCEDURES



## DEPARTMENT PLANNING PROCESS

WHAT	WHO	WHY	HOW	WHEN	OUTCOME
Identification of Needs A. Department E. Local/District hearings C. Validation					
Report of educational needs in Vermont					
Goal determination A. Review of present goals B. Establishing priority goals					
Measurable divisional objectives to accomplish goals					
Coordination of objectives					
Descriptive statements to accomplish objectives					
Budget					
Program evaluation design					
C. Reporting, revision, recycle					

DEVELOPING AN EDUCATIONAL PHILOSOPHY

IN LOCAL SCHOOL DISTRICTS

WHAT

WHY

HOW

WHO

TIME

PRODUCT

Developed by the Planning Division, Vermont State Education

Department, Montpelier, Vermont

February, 1974

What is a philosophy?

"The secret made evident as it relates to why we operate."

"The ideals a school system attempts to realize in its practices."

Philosophy - means a composite statement based upon beliefs, concepts, and attitudes from which the educational purpose of the district is derived.

#### Philosophy -

Why develop a philosophy -

- clarifies beliefs, values, and direction for a total organization
- establishes a foundation on which further planning can be completed
- serves as a rationale on which to develop goals

How to develop a philosophy document -

- Step 1 - review the guidelines for philosophy development from the document, "Educational Philosophy Development."
- Step 2 - review existing philosophy documents in the organization.
- Step 3 - participate in value clarification exercises
- Step 4 - as a group share basic belief statements that focus on the areas of student, learning - what a school should do.
- Step 5 - philosophy development committee establishes an outline for areas to be included in the philosophy.
- Step 6 - place brief statements from Step 3 into categories of philosophy outlined.
- Step 7 - committee reviews document for completeness and acceptance i.e. public hearing - survey of philosophy summary.
- Step 8 - submit document to the local board(s) for approval as a policy.

Who develops the philosophy -

1. A task force established by the local board(s) in an advisory capacity that has been given the change to complete the previously described steps and then disband; or
2. An overall comprehensive planning committee begin the entire process by establishing a philosophy.

In either alternative the task force or committee should be composed of no more than 9 people from the following representation: parent, central office, board member, secondary student, teacher, local government official.

How long does it take to develop a philosophy document?  
No longer than one month when the group meets weekly.

What is the product from developing a philosophy?

A written document (not exceeding 2 pages) that has been accepted by the local board(s) as official policy.



# DEVELOPING EDUCATIONAL GOALS

## IN LOCAL SCHOOL DISTRICTS

WHAT

WHY

HOW

WHO

TIME

PRODUCT

"The value of setting goals is as much  
in the process of participation as in  
the final outcome."

Developed by the Planning Division, Vermont State Education

Department, Montpelier, Vermont

February, 1974

## What are goals?

Defined - a statement of broad direction or intent which is general and timeless.

Goals set forth the characteristics which the community wants its students to have; they state the kind of children the community wants its schools to develop; they describe in broad terms the product it wants the schools to produce.

### Why?

1. goals set direction and targets for educational programs.
2. specifies in general terms the responsibilities of a school district.
3. goals establish ideals.

### How to establish?

- PDK process --
- Local district existing documents - i.e. board policy, curriculum materials, district philosophy statements.
- brainstorming or synectics
- other Vermont districts
- other state collections of goal statements

### How to validate goals?

- Delphi procedures
- cross impact matrix
- survey of community
- acceptance by boards as policy

### Who develops goals?

Goals should be consistent with the district philosophy and can be developed with few or with many people in a district.

The following alternatives may be used:

1. a planning committee can develop the initial goal statement using one or more of the processes previously described.
2. all community members, staff, and students desiring to participate in a goal setting session. The planning committee would use the results to establish a set of goals.
3. randomly select staff, students, and community members, (total not less than 30) and use material developed from the group to establish goals.

### Who validates goal statements?

Goal statements are reviewed and modified by all of the interest groups of the school district. The purpose of this process is to establish goals that can be known by many groups in a district.

Validation may be completed by the same people who develop the goal statements using one or more procedures outlined in this document.

The final validation of the goals will be completed when the final plan is submitted to the board(s) for review, modification, and adoption.

DETERMINATION

OF

NEEDS

WHAT

WHY

HOW

WHO

TIME

PRODUCT

"IDEAL - REAL = NEED"

February, 1974

Developed by the Planning Division, Vermont State Education Department,  
Montpelier, Vermont

Time to develop -

Small district: one full day  
Approx. 100 - 200

Medium district: two full days  
200 - 1000

Large district: two full weeks  
Above 1000

Product -

A listing of goal statements with or without explanations of the statements.

### What are needs?

Needs are defined as the gap that exists between the goals of the district and the perceived accomplishment of the goals at the present time. The difference between the ideal and the real.

### Why complete a needs study?

- Provides data for program development.
- Provides a way to determine strengths and weaknesses in programs.
- Provides a basis for establishing priorities.

### How to complete a needs study

1. Identify needs of learners, facilities, staff, community that are related to education.
2. Categorize needs statements - e.g. students, community, facilities, staff,
3. Determine technique for validating needs i.e. interviews, surveys, analysis of records.
4. Relate needs to goals. The need statements become objective data to use in the determination in the attainment of goals.
5. Use an instrument that indicates which goals are in greatest need of emphasis.

Goal statement \_\_\_\_\_

1                      2                      3                      4                      5  
(poor)                      (fair - but more needs to be done)                      (too much is being done)

6. List goals in priority order.

Who completes a needs study?

The planning committee develops the strategy to complete the needs study and insure participation of community, students, and staff.

<u>Time</u>	<u>1-6</u>	<u>7-8</u>	<u>9-12</u>	<u>Total</u>
Small	1 mo.	1	2	4
Medium	2 mo.	2	3	7
Large	3 mo.	3	4	10

Products:

1. Listing of needs statements
2. Results of survey instruments
3. Priority listing of goals with needs statements as rationale.

## PLAN OF ACTION

WHAT

WHY

HOW

WHO

TIME

PRODUCT

Developed by the Planning Division, Vermont State Education  
Department, Montpelier, Vermont

February, 1974

## PLAN OF ACTION

### What is it?

The activities that will accomplish the measureable objectives.

Establishes who does what, when and where in terms of how.

How you implement the objectives!

### Why complete a plan of action

1. It fixes responsibility for certain activities to take place.
2. It builds on the strengths of individuals in an organization.
3. It identifies where there is need for further training of staff members.
4. It establishes a management system to implement the stated plan.
5. It provides a time to explore alternative programs.
6. A definite time sequence is established for activities.



ExamplePLAN OF ACTION WORK SHEET

Goal: Children demonstrate good citizenship.

Objective: Each student attends town meeting March 5 as reported by each student.

How do you plan to implement this objective?	Who is responsible?	When will it happen?	Materials Resources Needed	Cost
1. Orientation of nature & purpose of town meetings.	Instruction	March 1	Const. of state Charter of town Film "Living in America"	Materials 5.00 Inst. time 100.00
2. Feedback from students attending town meetings.	Students	March 6	6 - small group two cassette recorders 6 recorders	-0- \$10 -0-
3.				
4.				
5.				
6. Instructors Remarks. How would you change the activities at a future time?				

Who: Teachers and administrators in a school district

Time: Overall activities = 6 months

- Day to day plans = daily or weekly

Product: A written document that can accomplish the stated objectives.

DEVELOPING MEASUREABLE OBJECTIVES

FROM EDUCATIONAL PROCESSES

FOR

STUDENTS

WHAT

WHY

HOW

WHO

TIME

PRODUCT

Developed by the Planning Division, Vermont State Education Department,  
Montpelier, Vermont

February, 1974

### What are measureable objectives?

Measureable objectives are defined as those skills, values and attitudes that students can demonstrate they possess upon completion of prescribed instruction plans, curriculum, learning experiences.

### Why complete measureable objectives?

1. Students can learn the material sooner and with greater retention.
2. Learning outcomes serve as a means for communicating with staff, students, and community.
3. Budgets can be developed from the outcome statements.
4. Provides a basis for evaluating the effectiveness of a school.
5. Achieves thoroughness, coordinations, and eliminates duplication.

### How do you write measureable objectives?

Each measureable objective need to contain the following elements:

Who - district, school, program, staff, student

What - do they know

- can be done

- are there attitudes, values, etc.

When - by what time

Measures of completion - How is the what measured?

The kind of objectives written depends on the specificity of the plan being developed.

### Kinds of objectives defined:

1. Institutional - The intended purposes of a school.
2. Grade level - The intended purposes of specific grades. All objectives for specific courses.

3. Program - The intended purposes of a specific course e.g. science, health.
4. Staff - The intended purposes of a staff member (position description)
5. Student - The intended purposes for a specific student.

Who

Steering Committee developing the comprehensive plan with impact from the staff, community, and students.

Time

Institutional objectives: three months

Grade level objectives: five months

Program objectives: six months

Student objectives: daily or weekly or monthly

Staff objectives: once a year

Product

A coordinated written set of objectives that are consistent with goals and philosophy.

PLAN OF ACTION CHART

Attached are a series of copies of a form called the Plan of Action Chart. This chart can be a simple but very effective tool in planning and visually monitoring the progress of a project. This chart helps you, in effect, "PERT OUT" a project.

Any project can be a suitable subject for a Plan of Action Chart; examples would be things like "conduct a study", "develop a proposal", "develop a training package", "hold a conference", "prepare a report", "prepare a newsletter", etc.

The attachments are as follows:

Attachment A - a blank copy of the chart - blank copies are available from Central Management.

Attachment B - a copy of the chart containing instructions for its completion.

Attachment C - a sample copy of a chart completed for a project - at the beginning of the project.

Attachment D - the sample project after one-third of the time has gone by.

Attachment E - the sample project after three-fourths of the time has gone by.

Attachment F - the sample project after it has been completed.

OBJECTIVE:

In charge of Project

TASKS TO BE ACCOMPLISHED

INDIV. RESP.

RESULT

PLAN OF ACTION CHART

Status as of

Date Chart Prepared

Frequency of Update

ATTACHMENT A

**OBJECTIVE:** (State the overall objective of the project as clearly and specifically as possible.)  
In charge of project (who has overall responsibility)

### PLAN OF ACTION CHART

Date Chart Prepared \_\_\_\_\_

Frequency of Update (weekly or bi-weekly or monthly) \_\_\_\_\_

Status as of (frame over and change date each time chart is updated)

#### TASKS TO BE ACCOMPLISHED

List each task that needs to be accomplished, in chronological order.

List the person or persons responsible for each task. If more than one person, list first the name of the person with primary responsibility.

#### RESULT

List the result or product for each task - i.e., what will show that task has been completed. Examples: report, briefing, conference, meeting, brochure, speech, memo, interview, plan, proposal.

Label the hashmarks - each mark represents 1 day or 1 week, depending on the duration of the project:

May June  
26 29 30 31 1 2 5 6 7  
OR  
(NOTE: list only working days here)

5/5 5/12 5/19 5/26 6/2 6/9 6/16 6/23

1. Prepare the Chart - schedule each task using the appropriate symbol opposite the task and under the date or dates:

○ = a one-shot task that takes one day or part of a day - "Brief Executive Director"

△.....△ = a task that takes more than 1 day - the first triangle is under the beginning day (or week) of the task, and the second triangle under the day (or week) when the task is scheduled to be completed - connect the two by a "dashed" line.

2. Update - when the task is begun, fill in the circle or the left-most triangle. When updating the chart, indicated progress (in a task of greater than one day) by connecting the dashes between the triangles to the same degree as the task has been accomplished. For example, if at update the task is 25% complete, then the line between triangles would be 25% solid and 75% dashes. If at a later update the task is 75% complete, then the line would be 75% solid and 25% dashes.

● = completed one time task

△.....△ = task just begun

△.....△ = task 25% completed

△.....△ = task 75% completed

△.....△ = task 100% completed

(NOTE: extend the form on the right-hand side if necessary for a project of long duration.)

ATTACHMENT B

3. If there is a schedule change, cross out the circle or triangle, and draw in new one.

4. Draw a vertical line from each symbol to the appropriate hashmark at the top of the page so that dates line up.





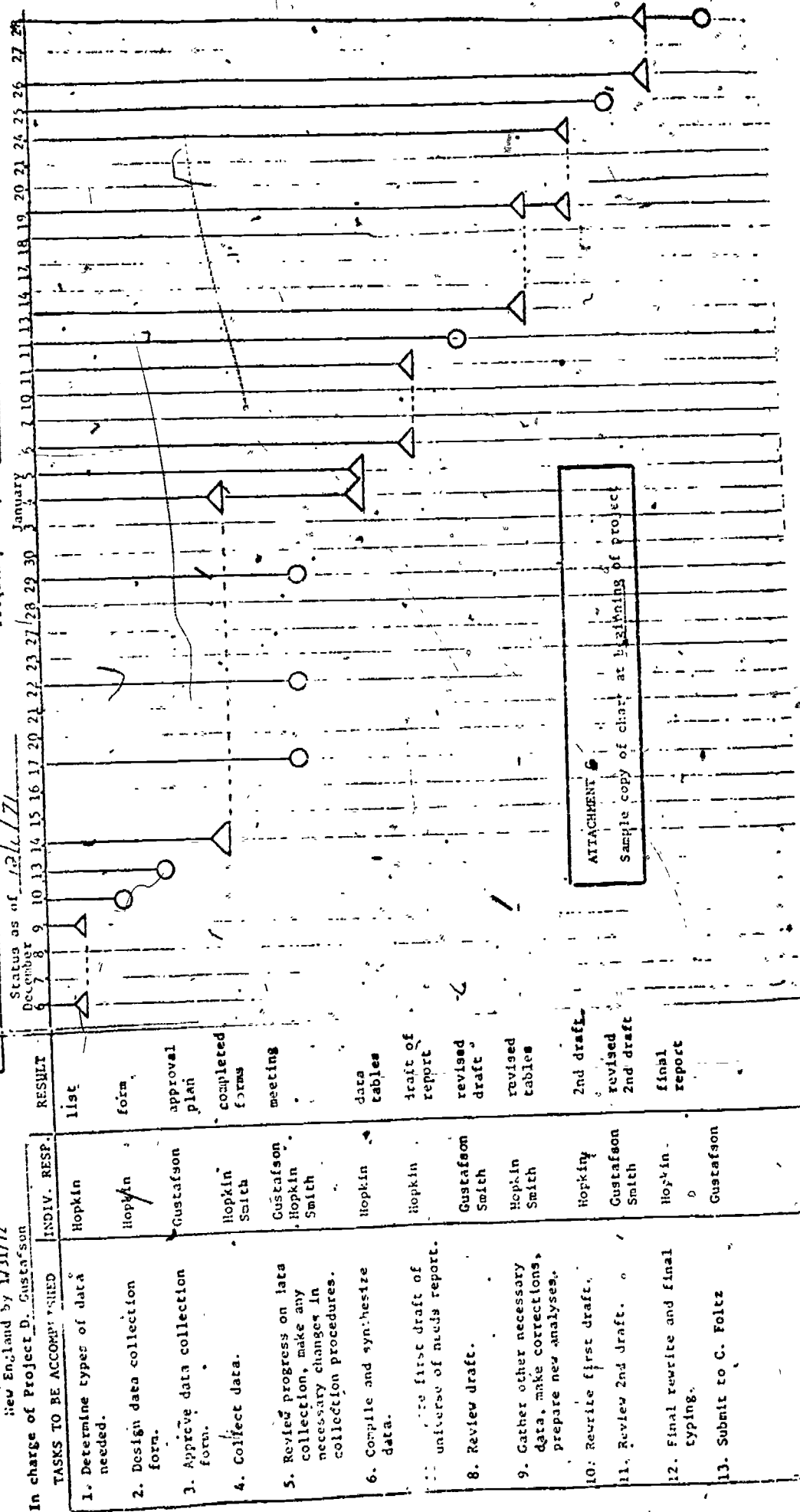
OBJECTIVE: Prepare a universe of needs study for  
New England by 1/31/72

In charge of Project D. Gustafson

# PLAN OF ACTION CHART

Date Chart Prepared 11/6/71

Frequency of Update Weekly



ATTACHMENT 6  
Sample copy of chart at beginning of project